

THE DATA IS IN!

The Difference Between A
Museum Surviving And Thriving
Rests With Membership



A note from IMPACTS

Thank you for attending the 2019 American Museum Membership Conference! Many thanks to the event organizers for inviting me to share data with this thoughtful group. We at IMPACTS hope that you will take time to consider the findings, discuss them, and use them as tools to help drive your organization forward in achieving your mission – especially in regard to membership!

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Thank you for your important work cultivating members! **Happy data diving!**

colleendilenschneider

know your own bone

A data-informed resource for cultural executives



DATA & ANALYSIS



THOUGHT FUEL



FAST FACT VIDEOS

impacts

Where does this information coming from?

- **IMPACTS VSO monitoring**
 - Ongoing, 224 visitor-serving organizations in the US
- **IMPACTS client data**
 - When permission is granted
- **National Awareness, Attitudes & Usage Study**
 - Ongoing, 124,000+ individuals
 - Representative of the United States
 - Populated by “lexical analysis” process
 - Perceptions regarding visitor-serving organizations
 - Believed the largest VSO-related survey in US

Why is membership uniquely important for museums today?

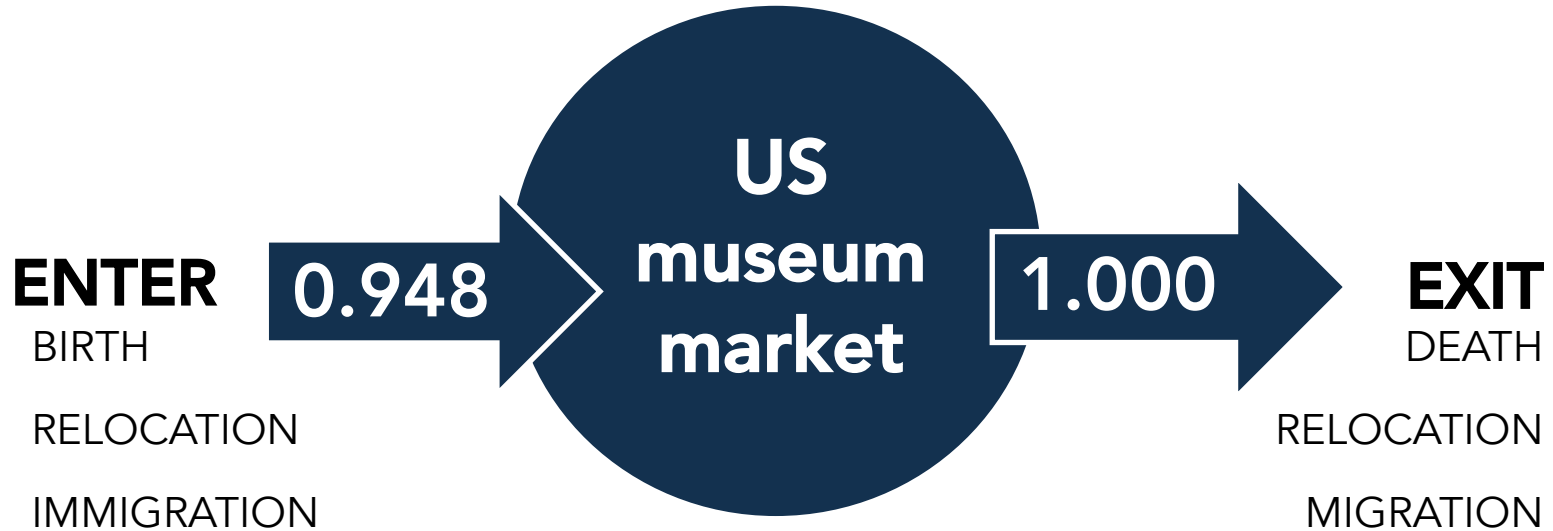
- 1) You are our opportunity.
- 2) You are our leaders.
- 3) You are connectors.
- 4) You are mission champions.

1) You are our opportunity.

Museums are facing engagement challenges



Current visitor substitution ratio
US exhibit-based "historic" visitor



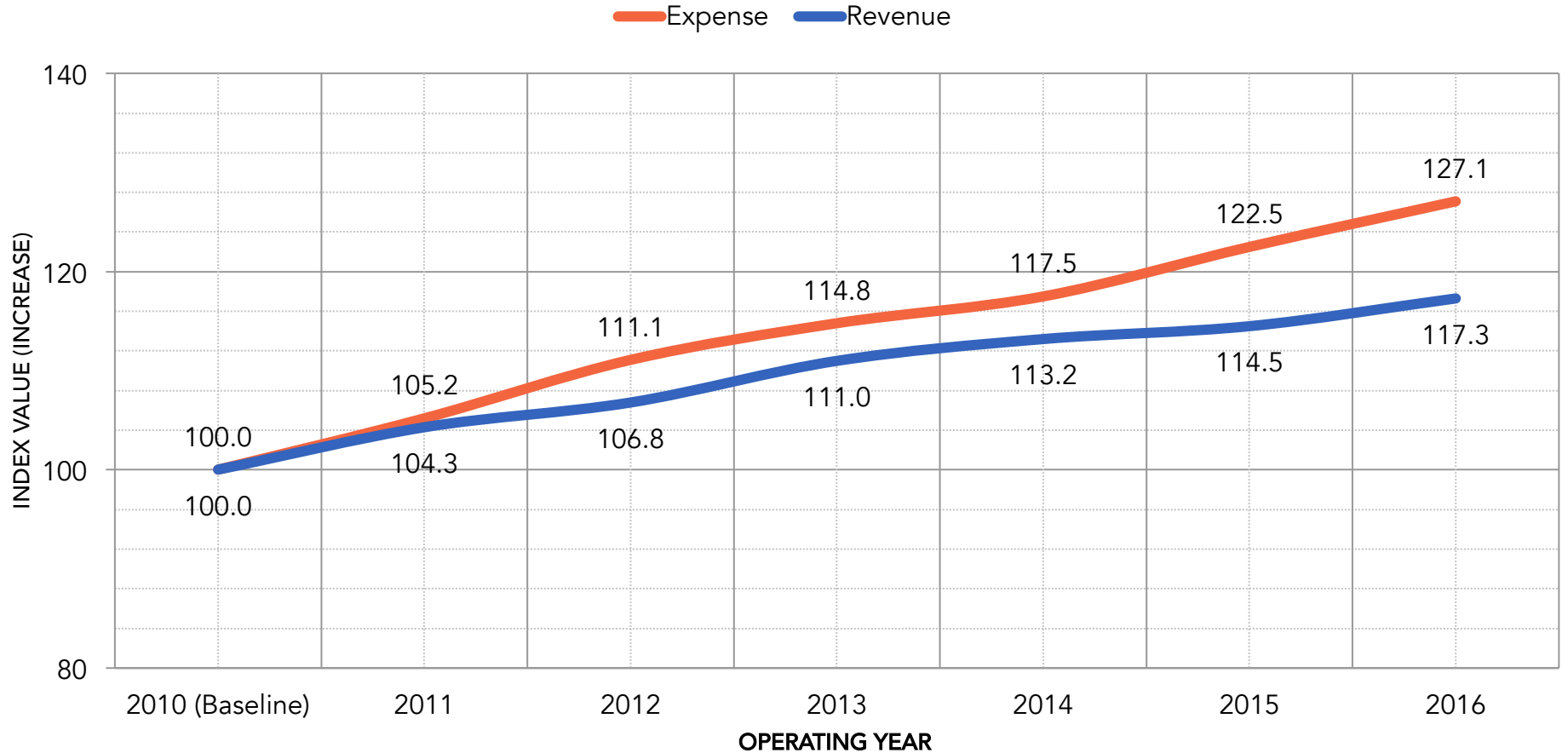
Less in + More out = Shrinking visitor base
(NEGATIVE SUBSTITUTION)

In the last ten years... (2009 – 2018)

- The US population has increased 7%
- The percentage of people who have visited a cultural organization has decreased 2.7%
- Of the 224 organizations monitored by IMPACTS, 151 (67%) have flat or declining attendance

Per Capita Operating Cost and Earned Revenue Analysis

Seven-year tracking analysis of 41 organizations, Years 2010-2016

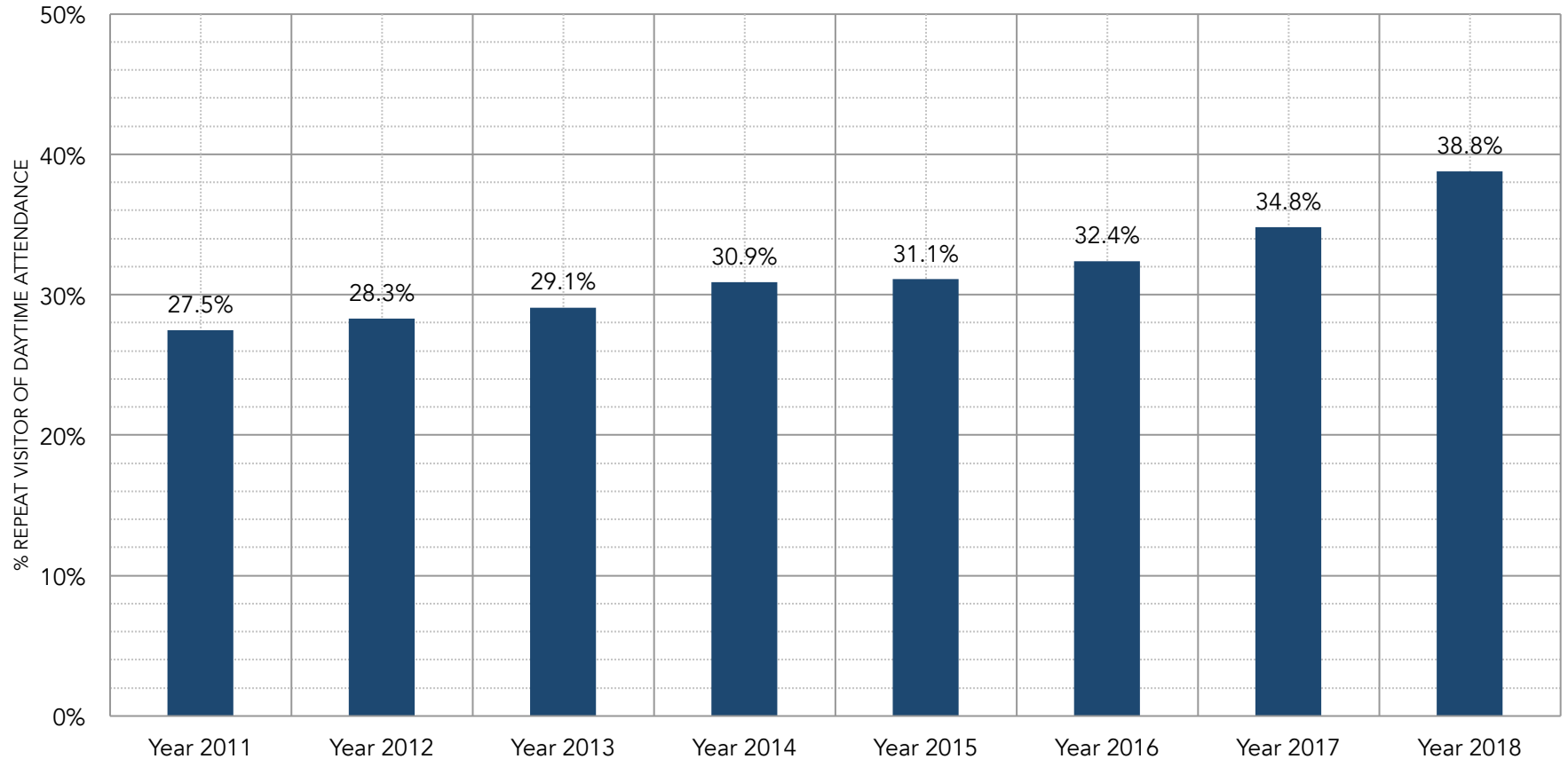


**BECOME
A MEMBER**



Repeat Visitation to Visitor-Serving Organizations

(US Adults, Years 2011-2018)



18 MUSEUMS
(WTH ADMISSION BASIS)

10 YEARS

MEMBER

VS

VISITOR

PRICE PAID
(ANNUAL)

\$92.71

VS

\$18.94

**FOOD
(ANNUAL)**

\$7.24

VS

\$5.03

**RETAIL
(ANNUAL)**

\$13.12

VS

\$8.14

GIFTS (ANNUAL)

\$22.18

VS

\$1.80

**TOTAL
(ANNUAL)**

\$135.25

VS

\$33.91

TOTAL

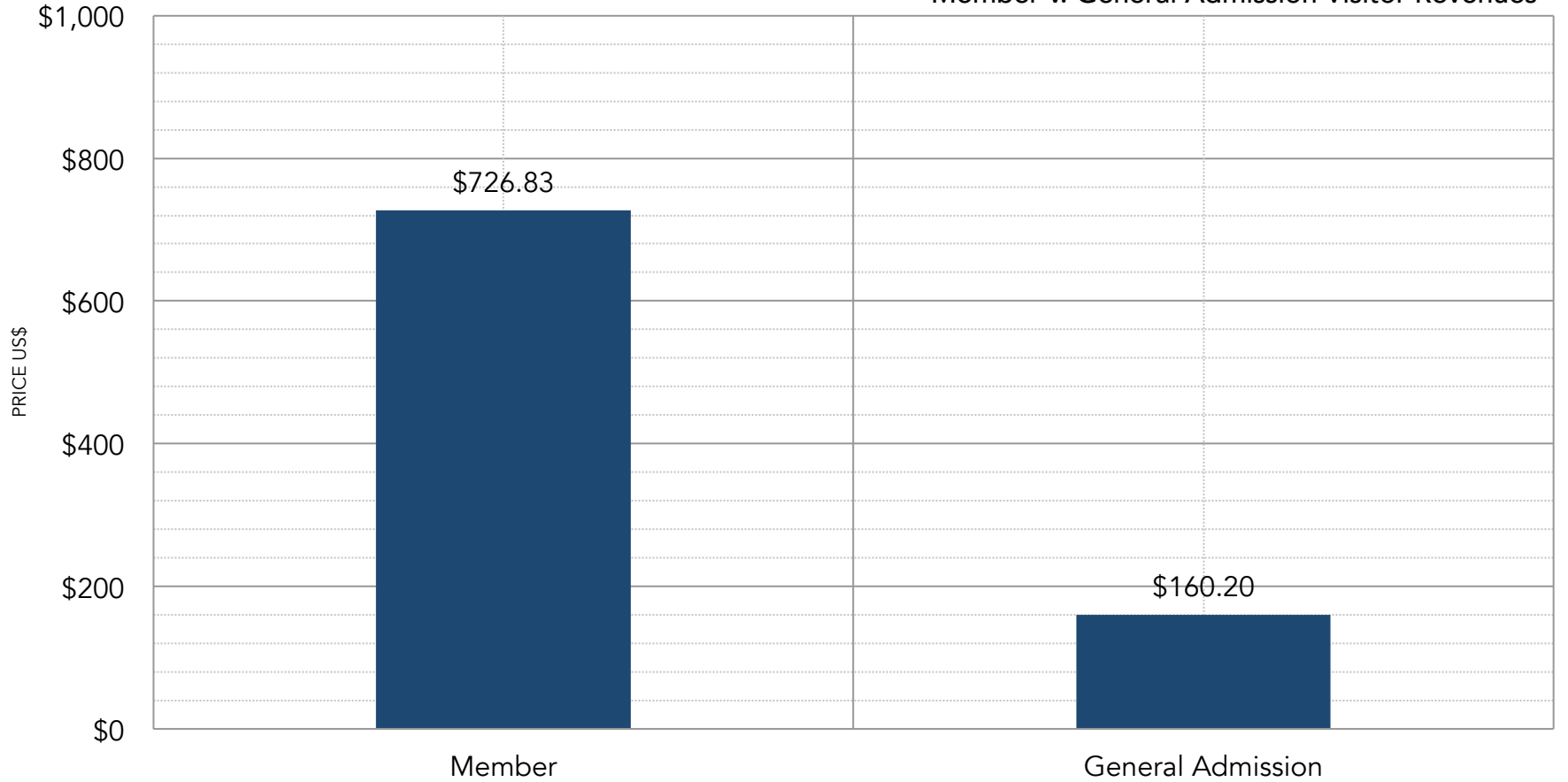
4x MORE!

But because retention rates are higher for members than visitors, members are worth more over time.

Take a look!

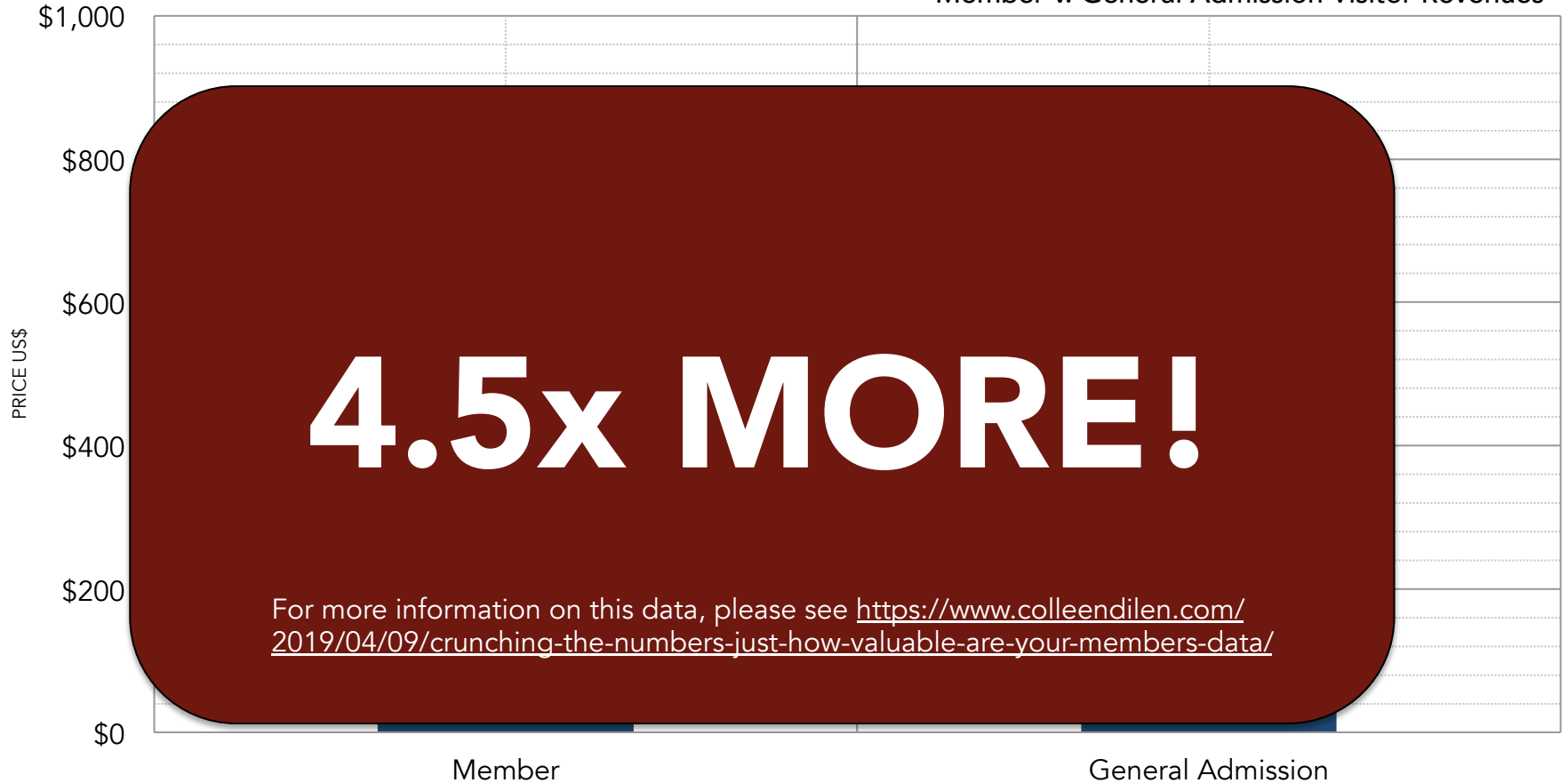
10-Year Visitor Value Analysis

Member v. General Admission Visitor Revenues¹



10-Year Visitor Value Analysis

Member v. General Admission Visitor Revenues¹



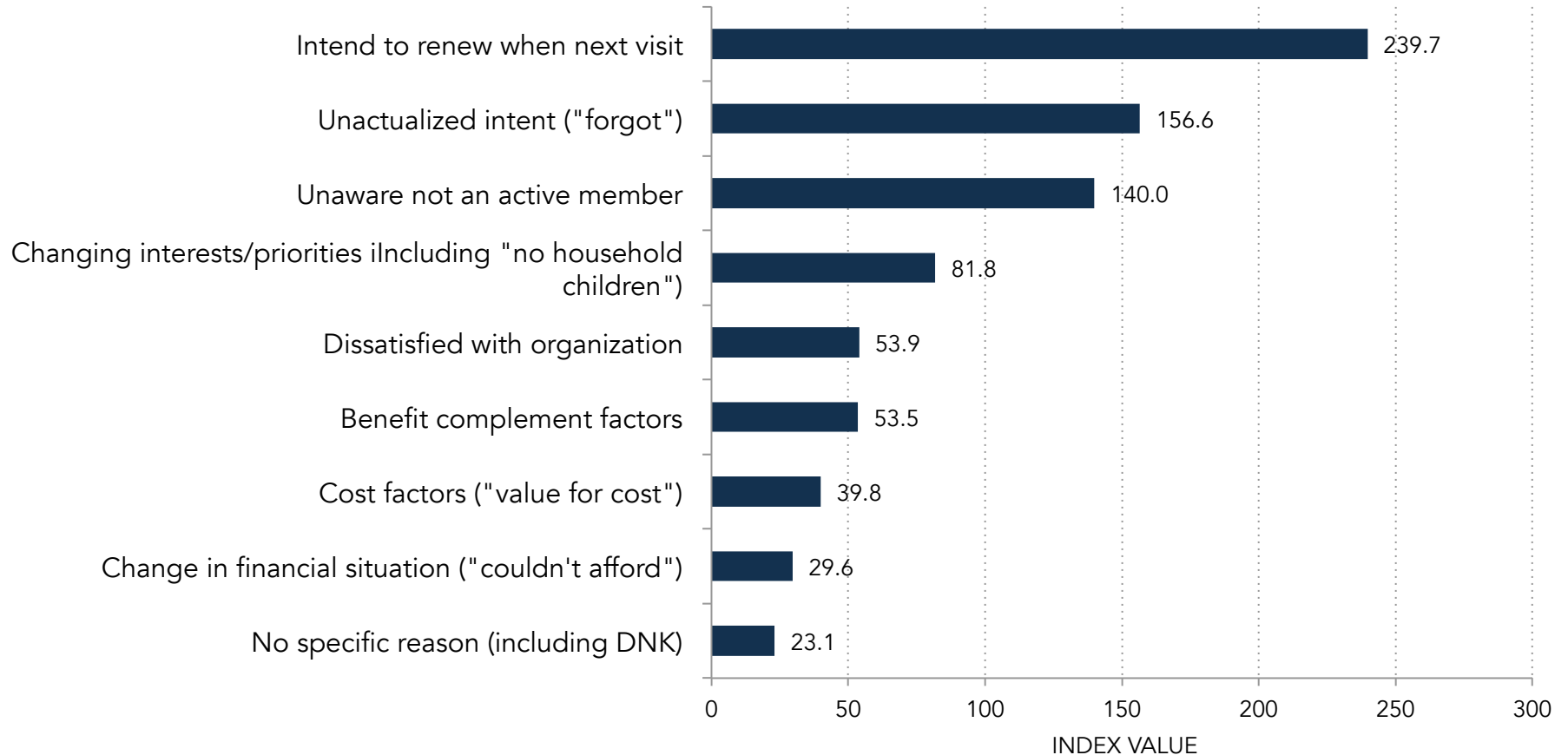
2) You are our leaders.

Membership merges onsite/offsite experiences in a changed world



Why did you not renew?

(Previous member to any cultural who did not renew within 24 months)



What influences the decision-making process?

Discretionary decision-making utility model

US Composite

Utility	Index
Schedule	147.9
Cost	121.3
Travel distance (proximity)	120.5
Special events	118.8
Reputation	117.5
"Family-friendly"	116.4
Nightlife	110.0
Climate	107.7
"Friends and family"	105.3
Safety	102.6
Specific activity/attraction	101.9
Ease of access	100.2

Western Europe

Utility	Index
Reputation	208.3
Schedule	140.1
Special events	137.8
Ease of access	127.7
Planning convenience	118.0
Nightlife	116.5
Travel distance (proximity)	108.7
Specific activity/attraction	108.2
Safety	103.1
Climate	102.6
Fine dining	102.4
Cost	101.3

High-Propensity Visitors

Utility	Index
Schedule	203.5
Reputation	181.2
Travel distance (proximity)	129.5
Ease of access	120.4
Planning convenience	116.3
Climate	112.9
Special events	108.0
Specific activity/attraction	107.8
Travel loyalty programs	105.6
Nightlife	103.3
Fine dining	102.7
Cost	100.4

Reputation

Reputation plays a role in driving success

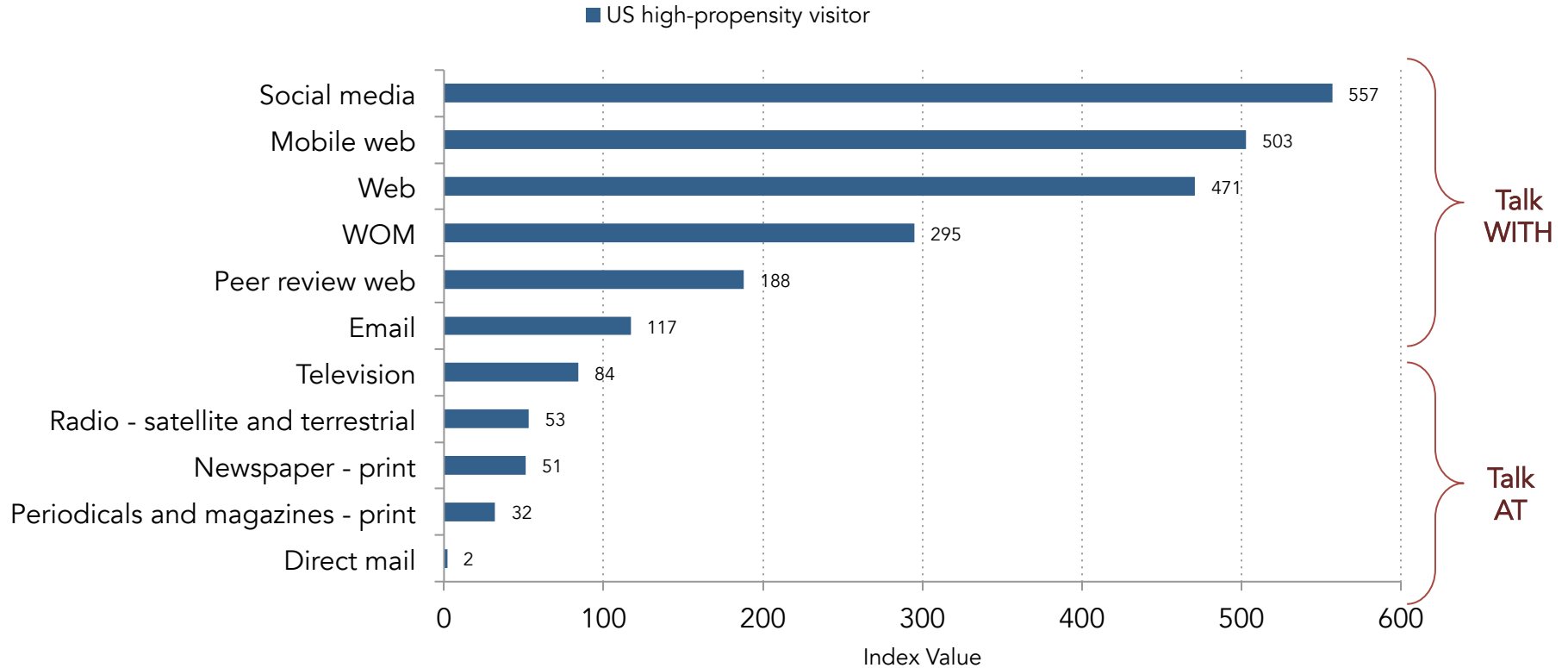
Paid Media
Advertising
Broadcast
Cable
Radio
Online
Cinema



Trusted sources
Peer reviews
Word of mouth
Interpersonal
Social media
Earned media

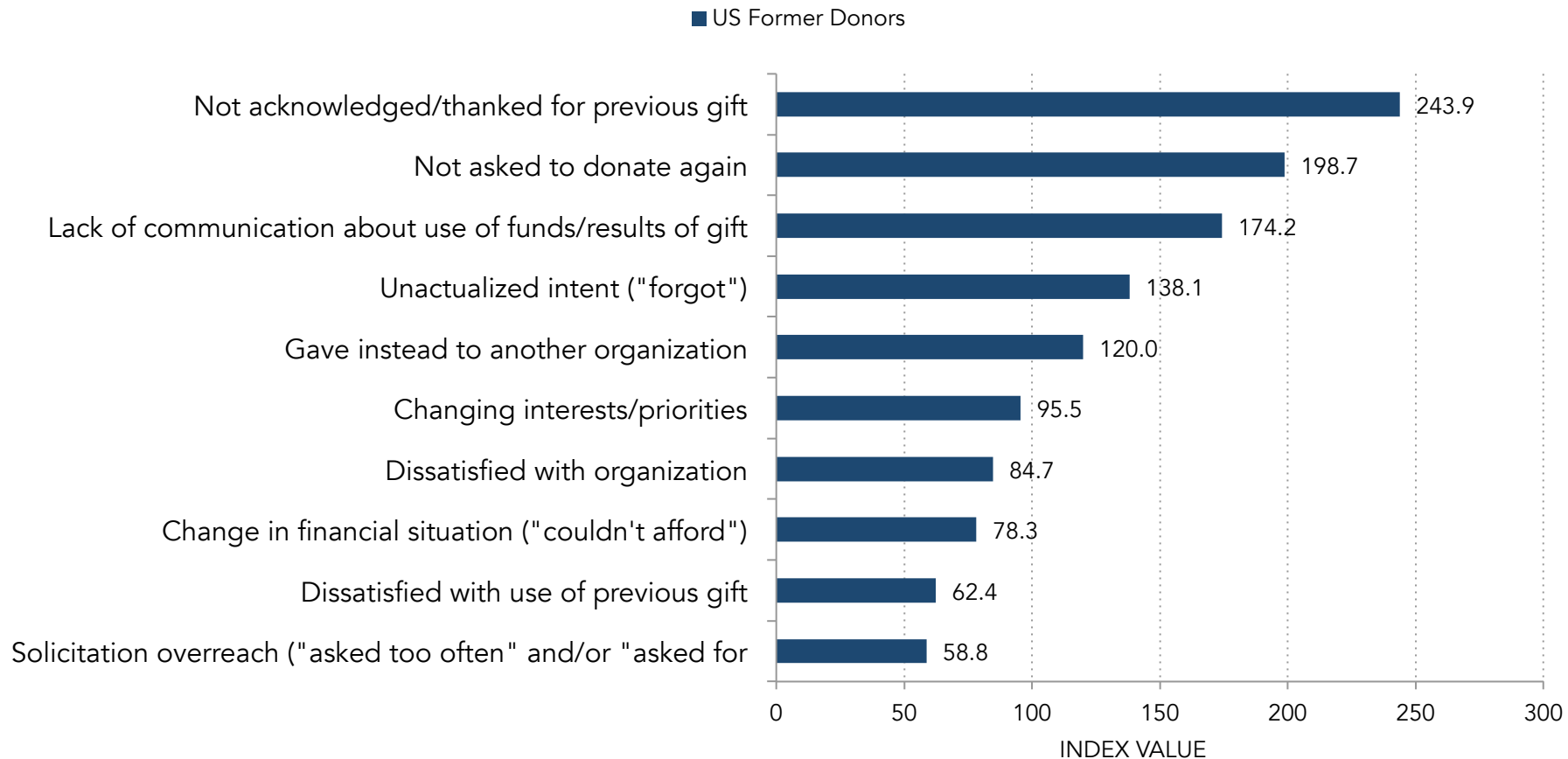
Q (the coefficient of imitation) has a value **12.85x** greater than that of **P** (the coefficient of innovation)

Sources of information for high-propensity visitors



Why did you not make a donation?

(Previous \$250-\$2,500 annual donors who had did not donate again within 24 months)



Premium Member Dissatisfiers

Dissatisfying Member-Related Experiences by Descending Rank
US Members with Annual Membership Values \geq \$250

Rank	Description	Mean Value
1	Solicitation telephone calls	2.3
2	Waiting in line / delayed access ("not being treated as 'special'")	2.8
3	Showing ID at entrance ("proving identity")	3.4
4	Volume of mail (e.g. renewal notices)	4.3
5	Family member limits (e.g. limit two children per membership)	5.1
6	Non-transferability of member benefits (e.g. "can't share with friend or family member")	5.5
7	Limited applicability of discounts (e.g. parking, food)	6.1
8	Limited special access for members (i.e. member hours, member entrance)	6.3
9	Infrequency of special member events	6.3
10	Price increase to renew	6.4

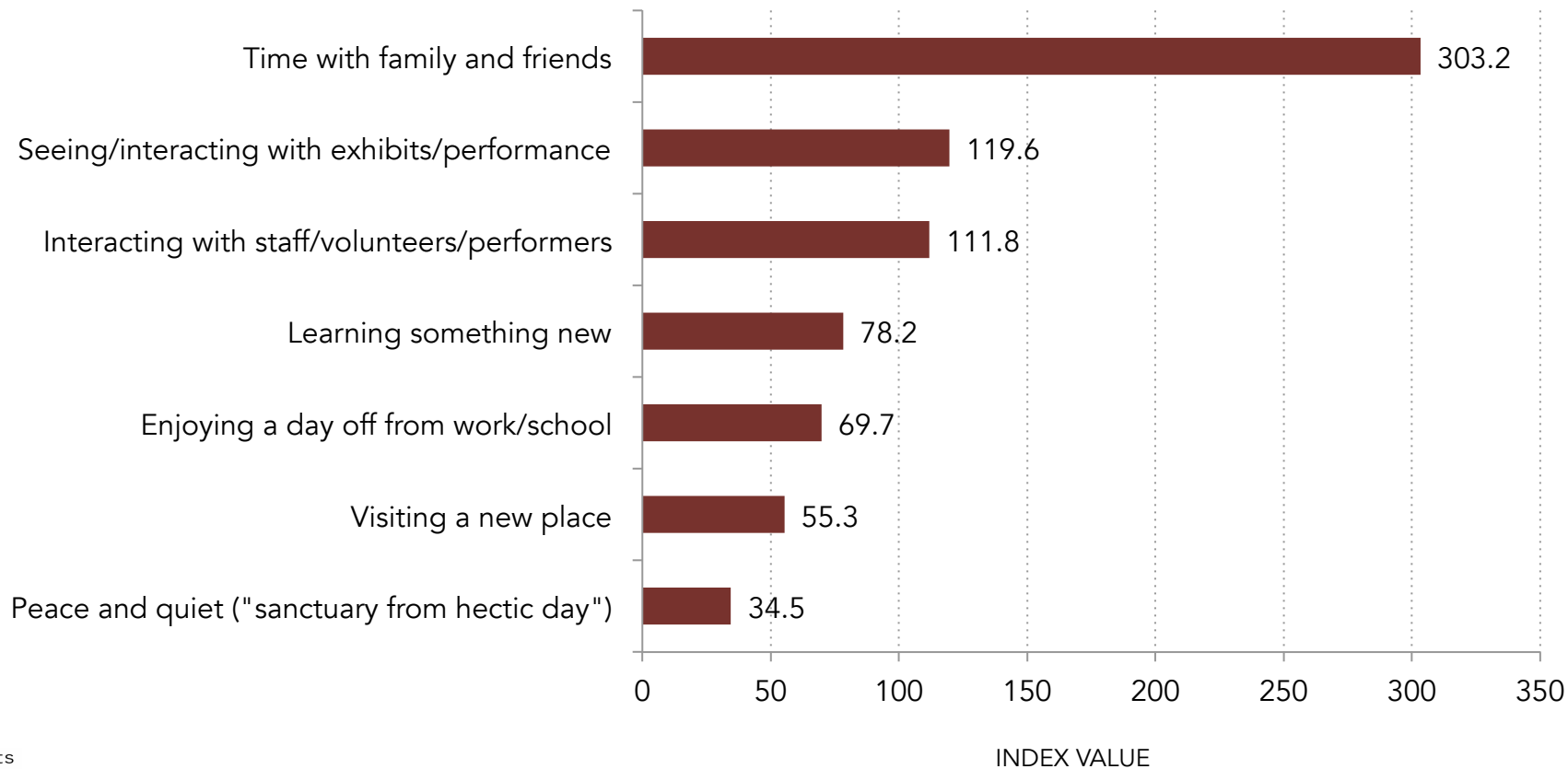
3) You are connectors.

Membership underscores a museum superpower

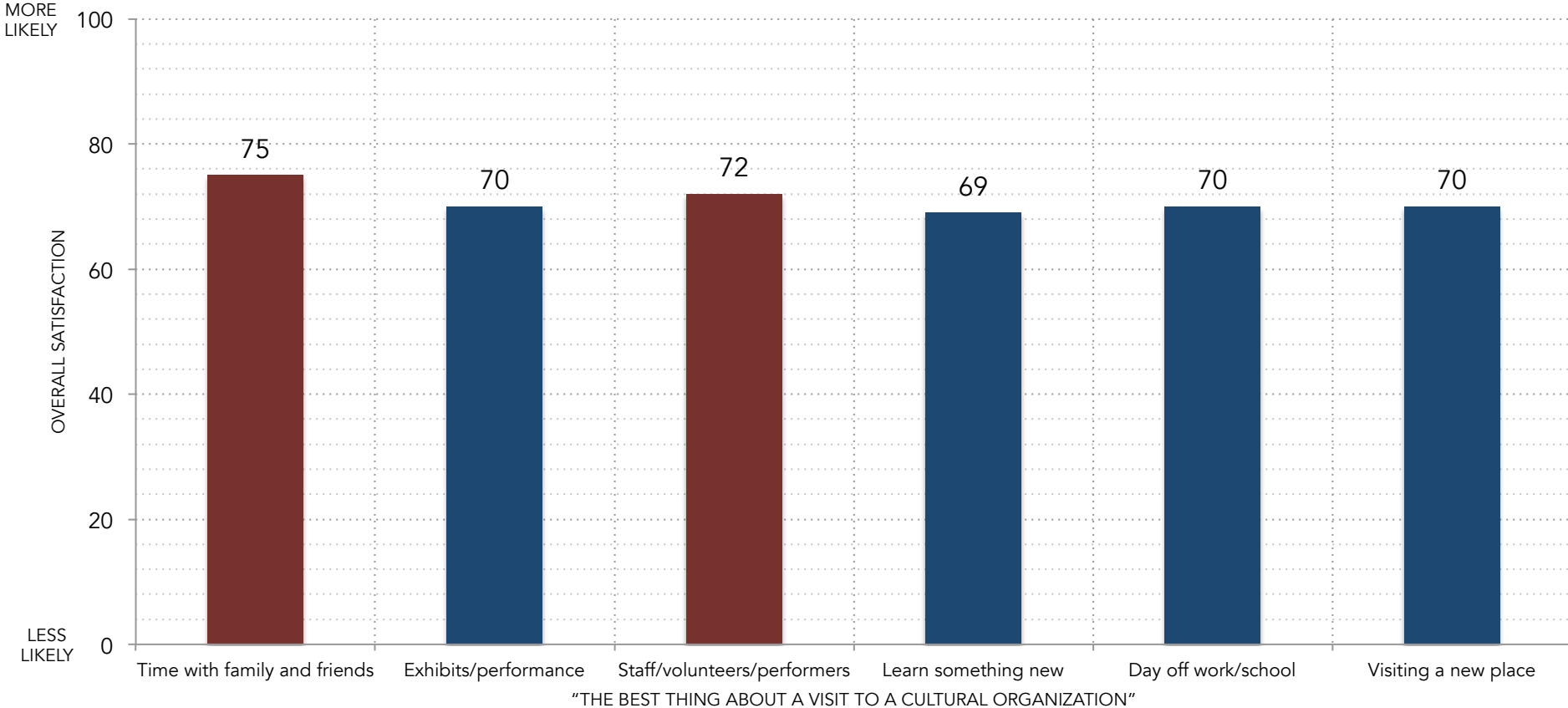


What is the best thing about a visit?

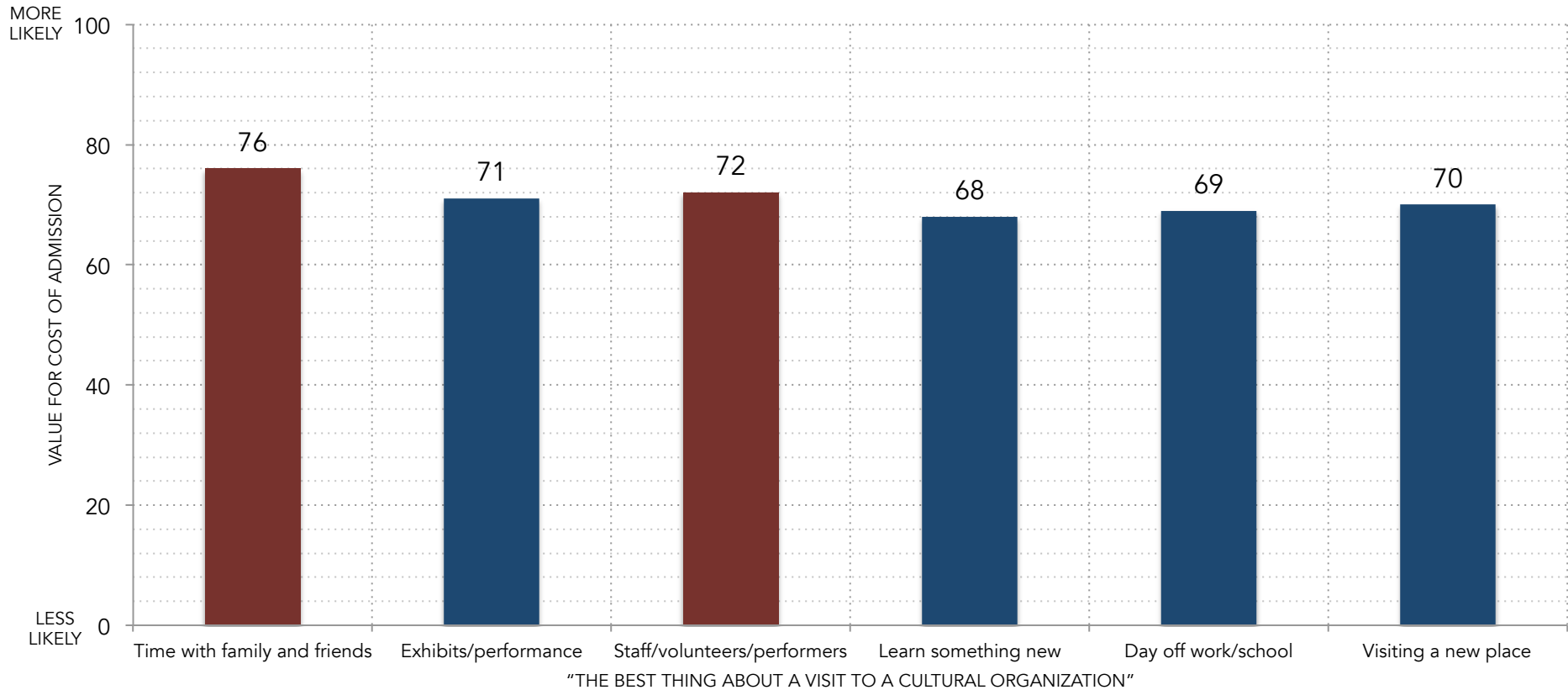
With > what



Overall Satisfaction by Best Visit Attribute



Value for Cost by Best Visit Attribute



Intent to Re-Visit Within One Year by Best Visit Attribute

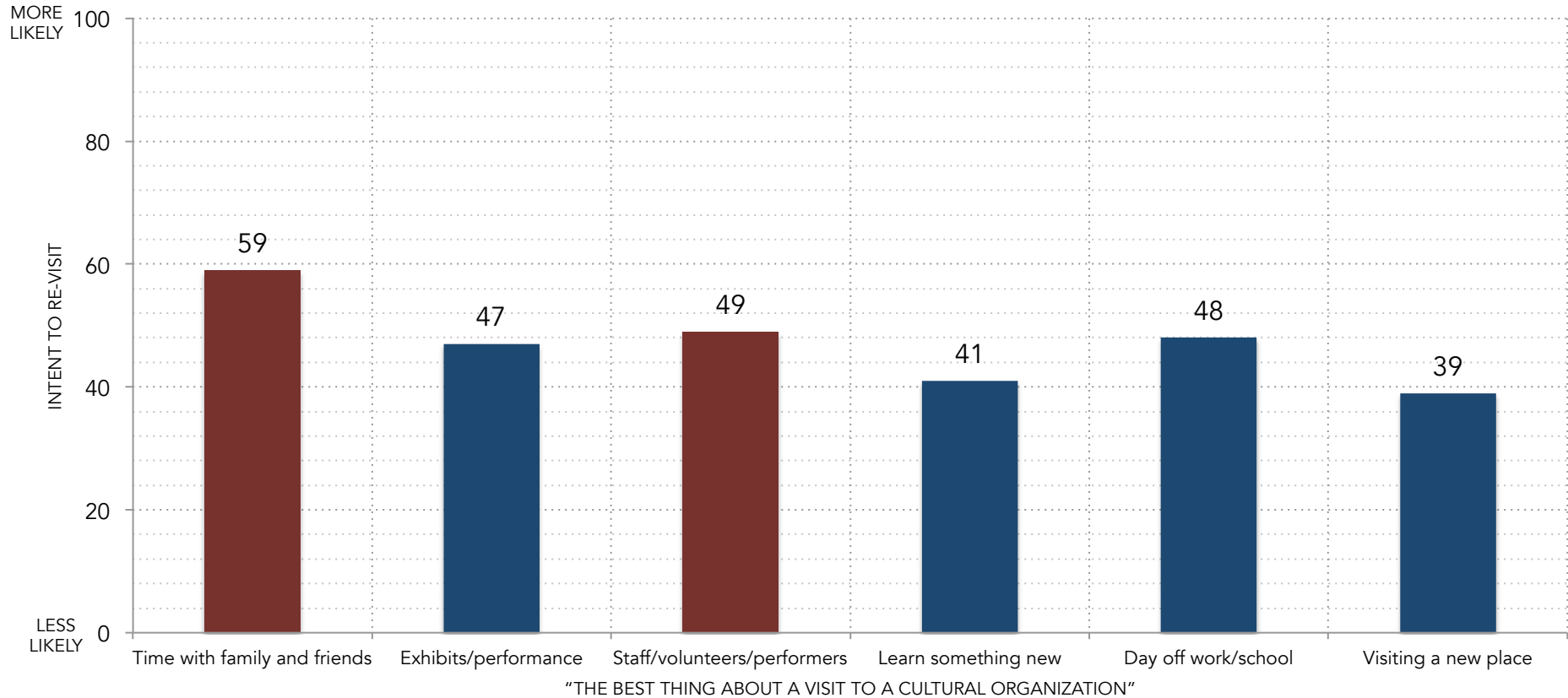
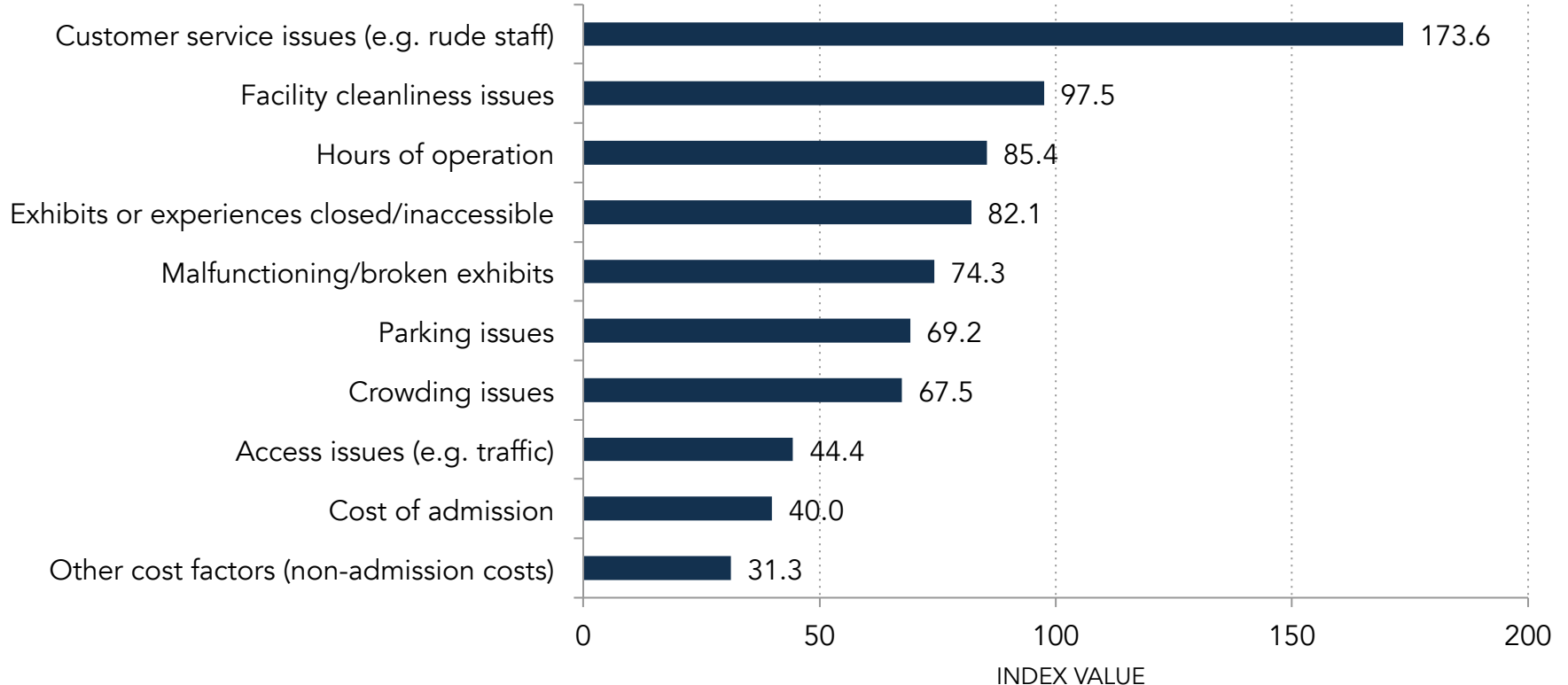


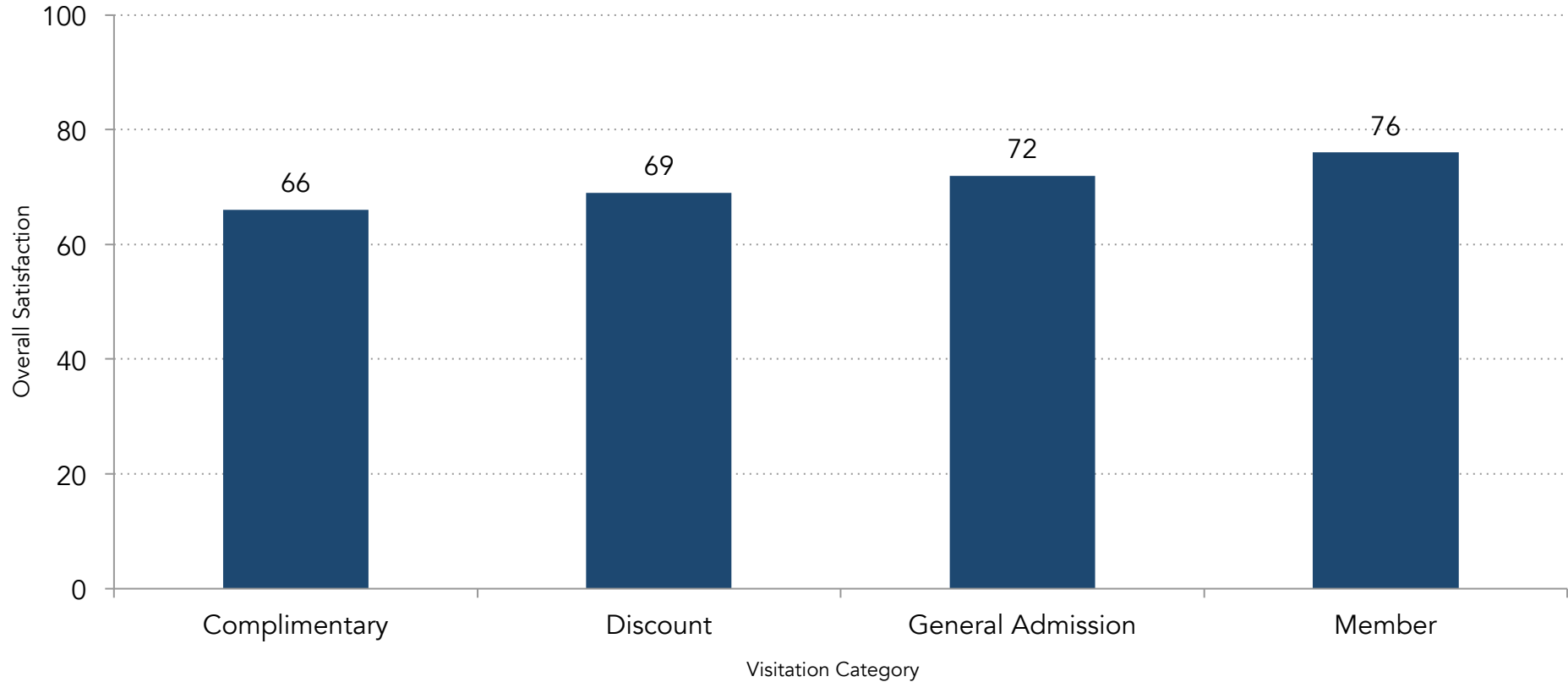
Exhibit-based visitor-serving organization dissatisfiers

(Most recent visit reporting overall satisfaction <60)

What factors contributed to your less-than-satisfying experience when you last visited a ... ?



Satisfaction by visitation category



4) You are mission champions

It's cool to be kind



“What is the primary benefit of membership?”

MILLENNIALS

(lexical analysis, top five by descending frequency)

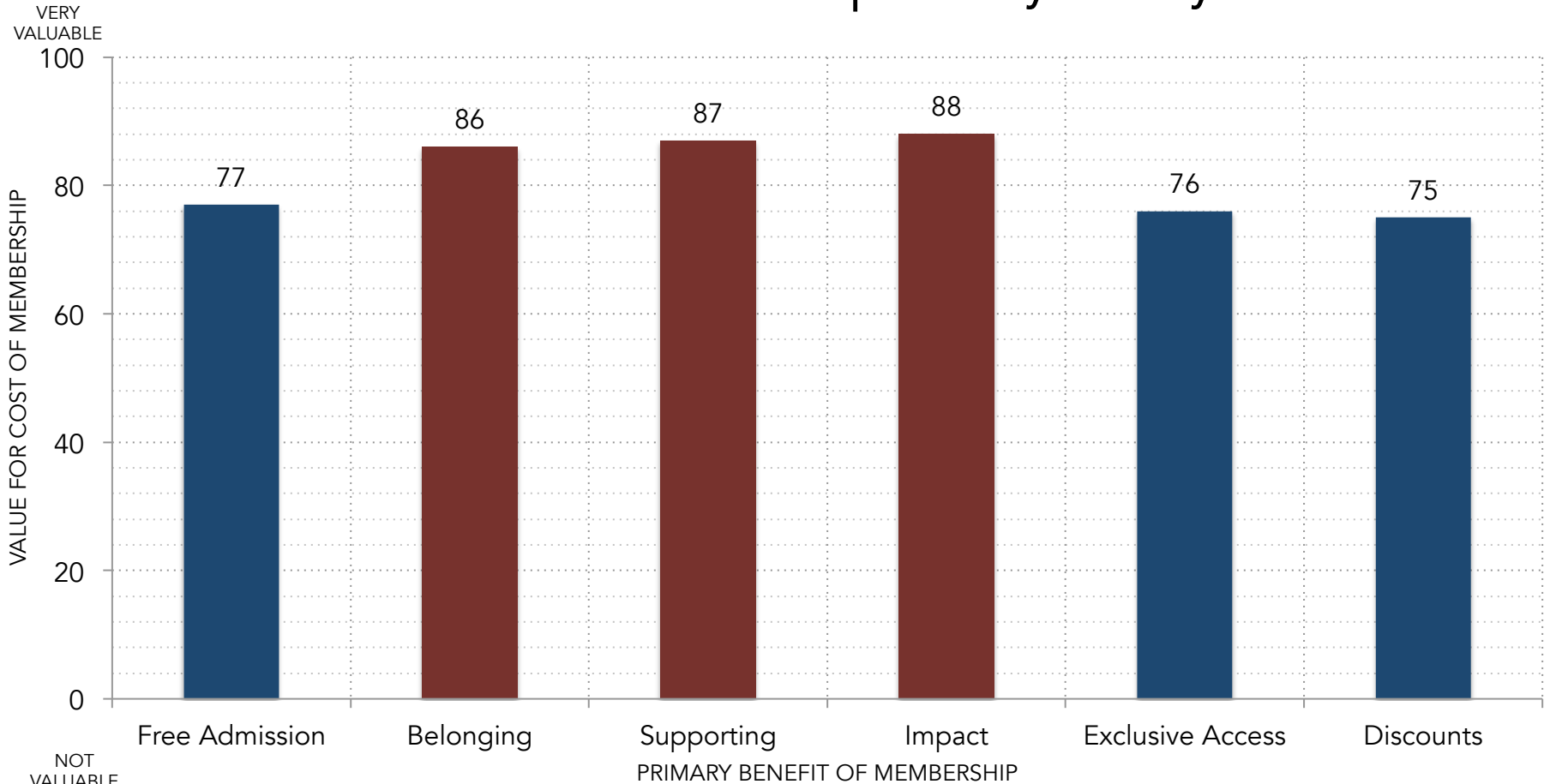
1. Free admission
2. Belonging to the [organization]
3. Supporting the [organization]
4. Supporting the mission
5. Making a positive impact on [mission objective]

BORN BEFORE 1980

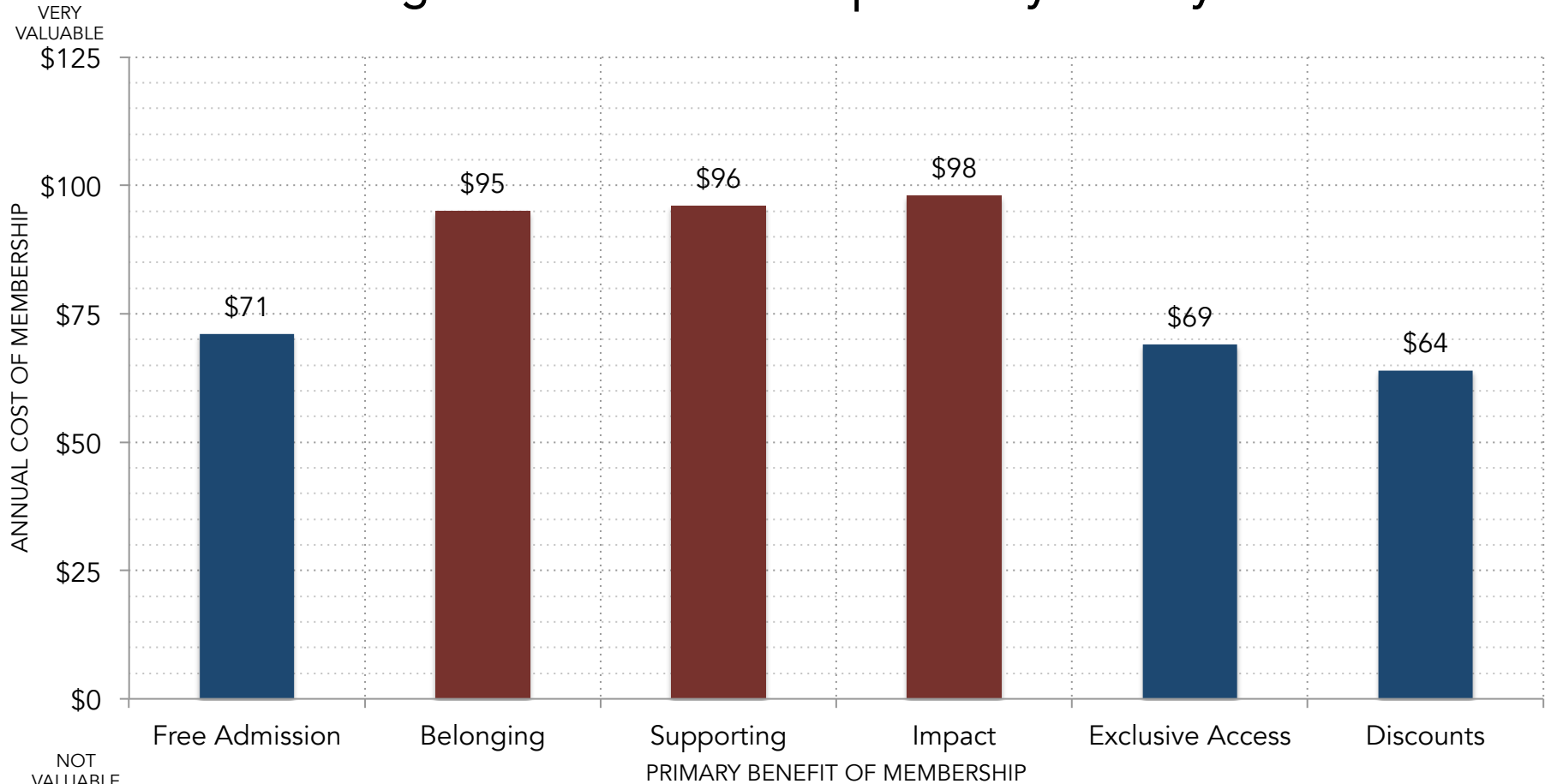
(lexical analysis, top five by descending frequency)

1. Free admission
2. Priority access
3. Members-only functions
4. Advance notice of upcoming activities
5. Member discounts

Value for Membership Cost by Primary Member Benefit

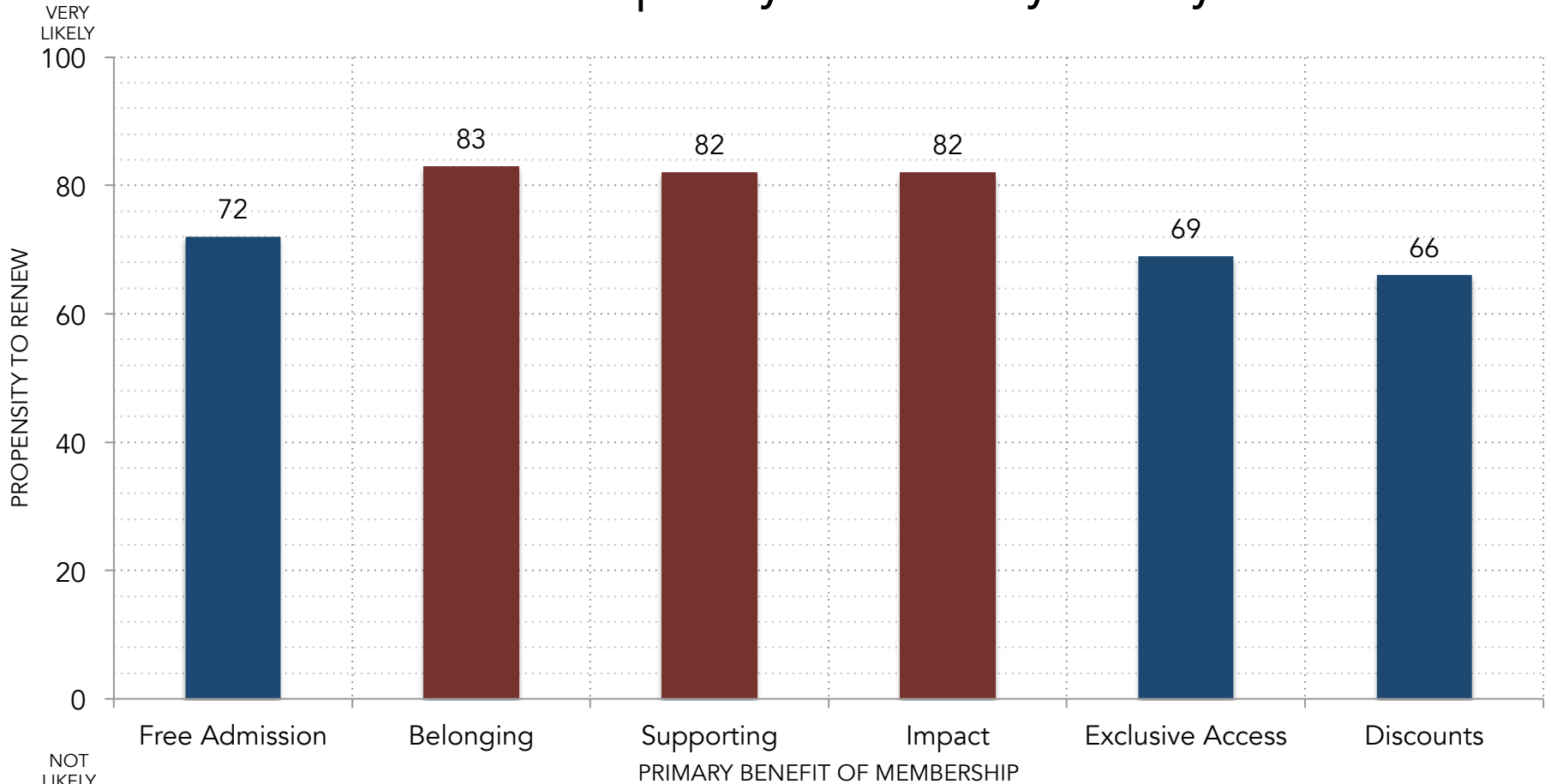


Average Annual Membership Cost by Primary Member Benefit



NOT VALUABLE

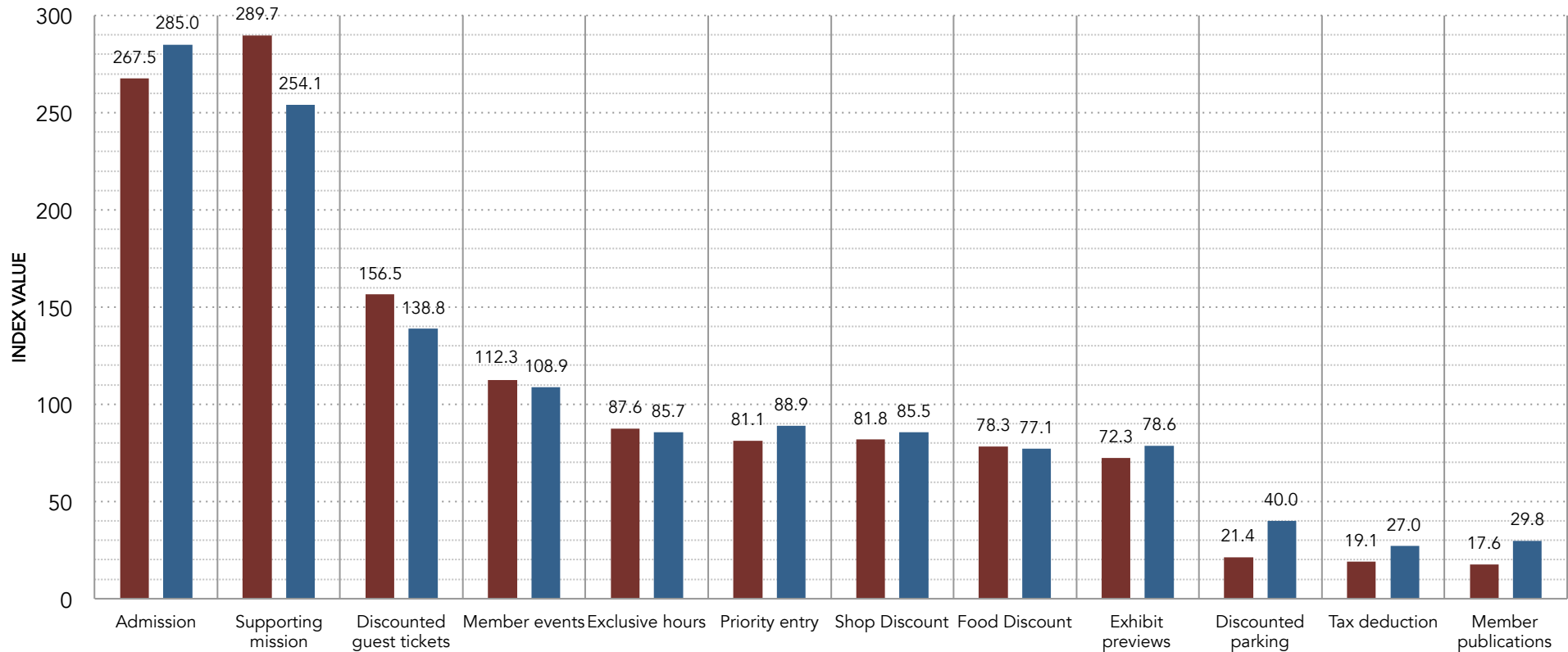
Propensity to Renew by Primary Member Benefit



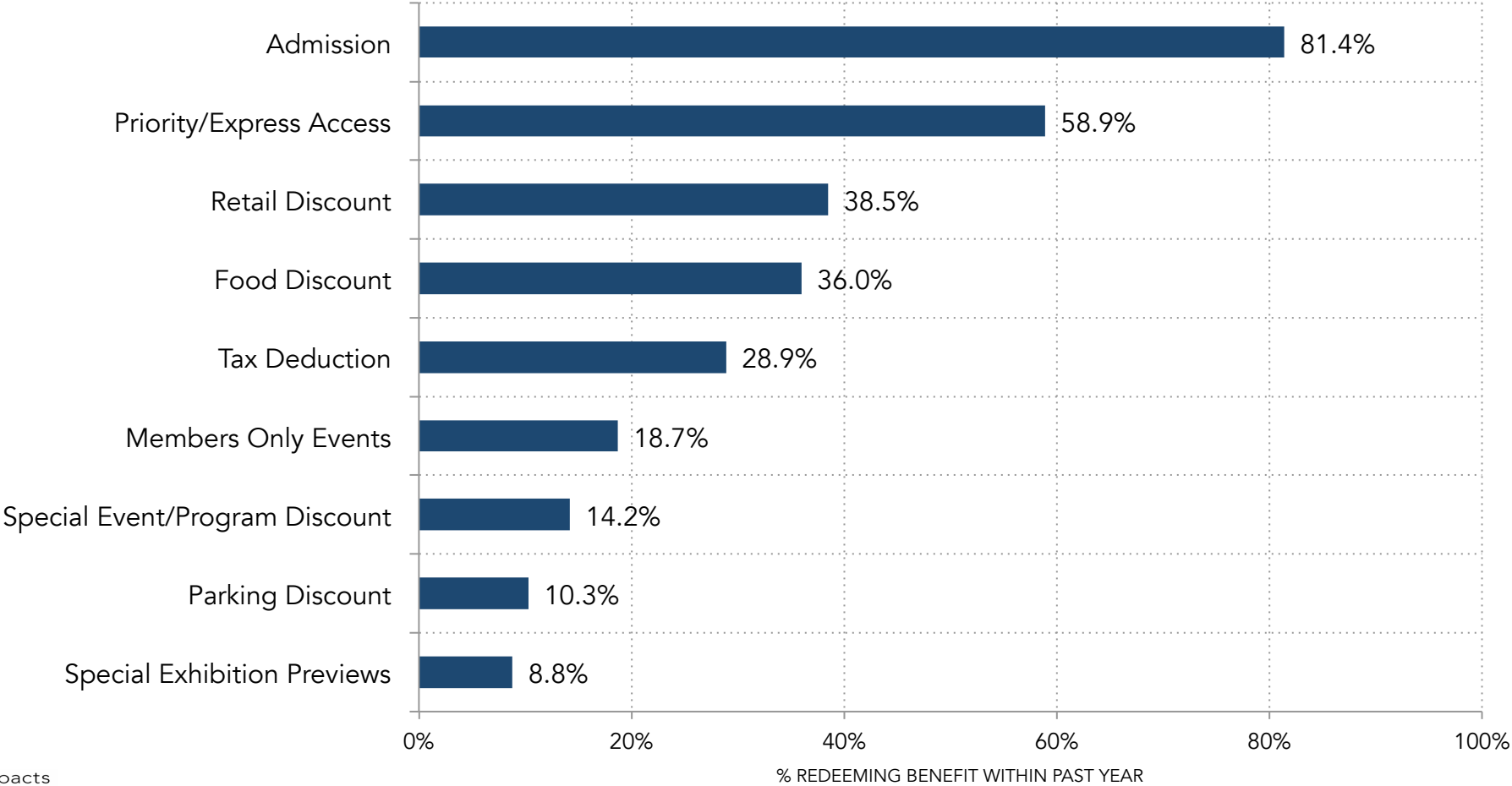
Considered individually, what are the three most important benefits that your membership to the ... offers you?

Annual memberships ≤\$250 by primary member age

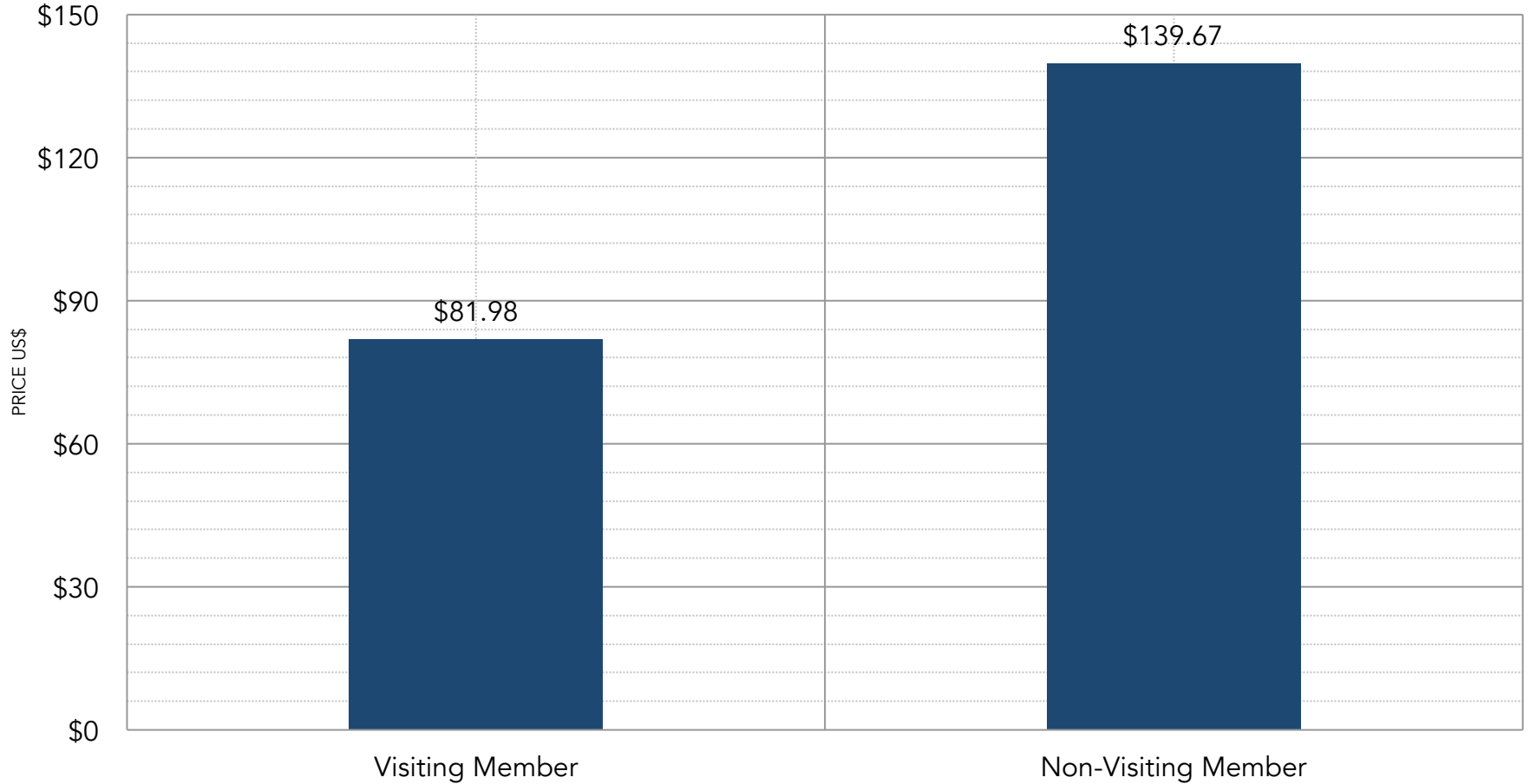
Millennials Born<1980



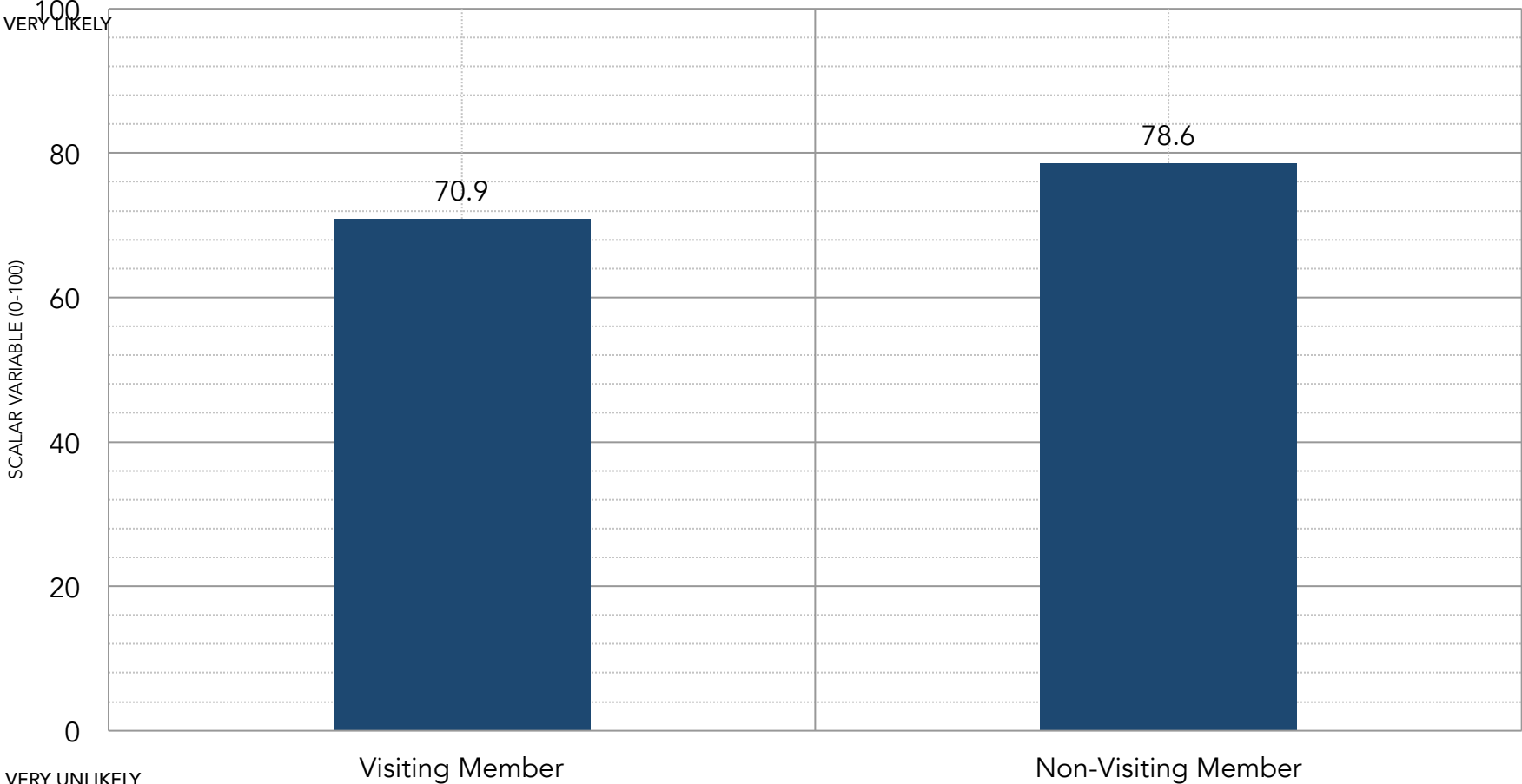
Member Benefit Annual Usage



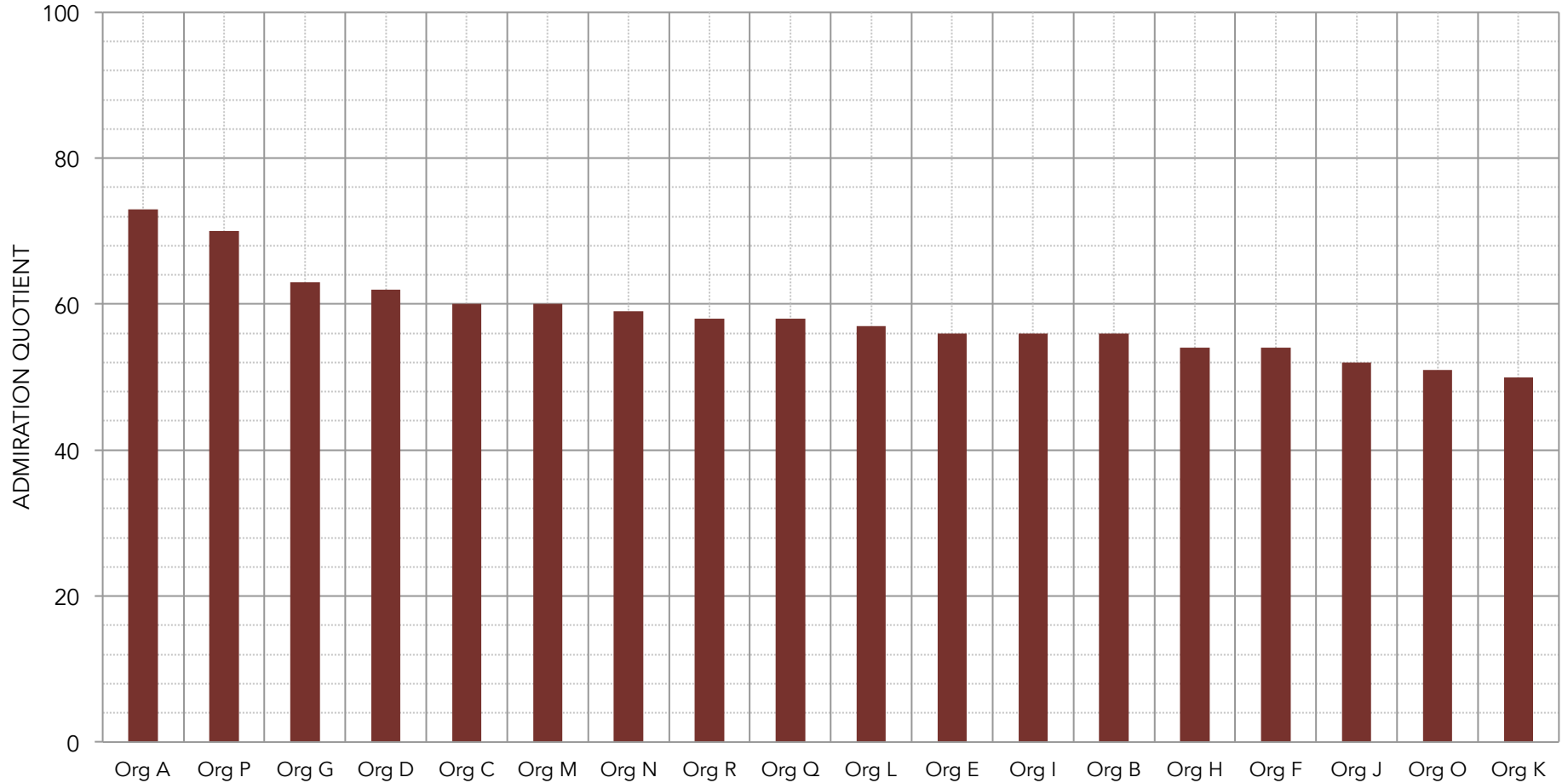
Average Annual Membership Value



Member Annual Intent to Renew

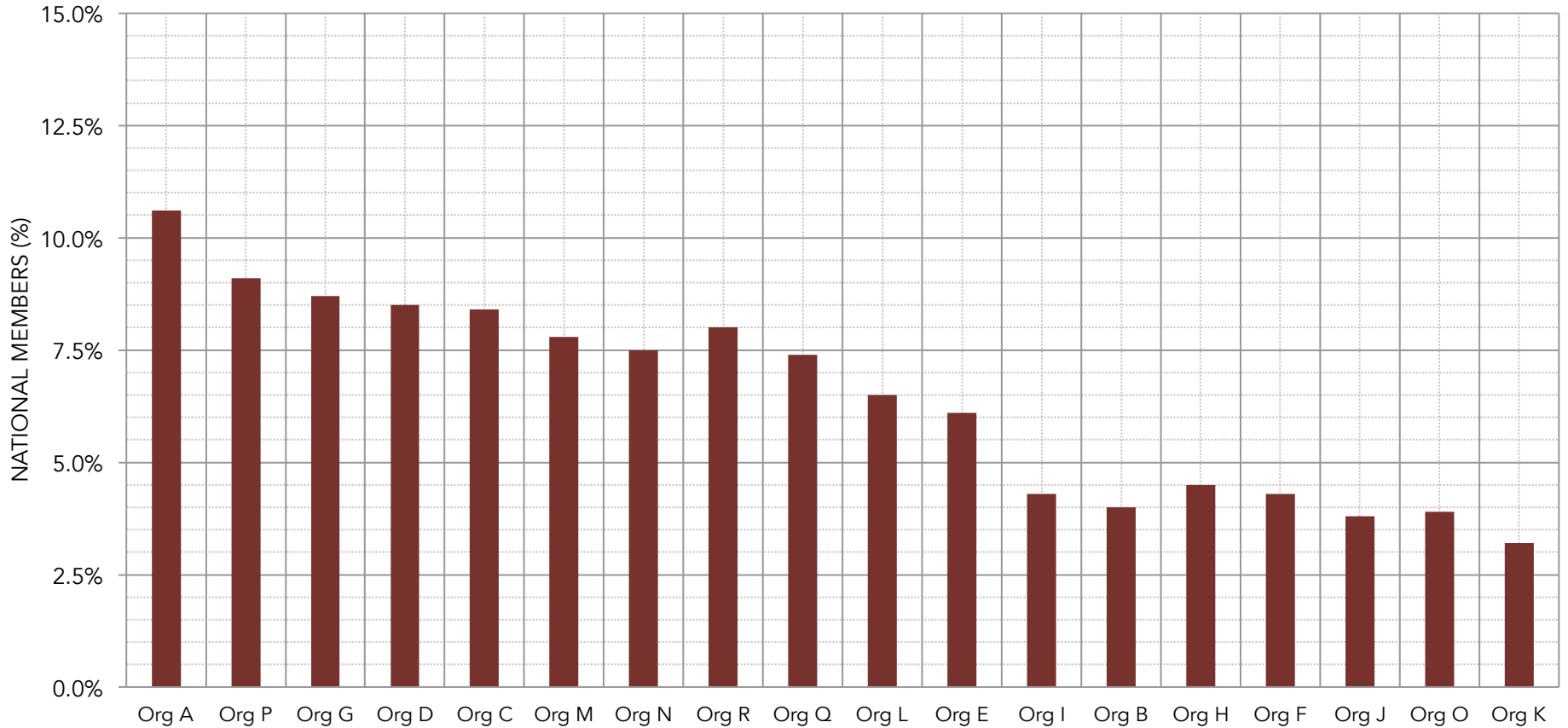


I admire the ...



Percentage of national members

Members residing >150 miles from organization



What are the three best things that you can do to support the mission of the ... ?

Lexical Analysis by Descending Frequency of Mention

Rank Description

- 1 Join the organization (buy a membership)
- 2 Donate to the organization
- 3 Buy a ticket to the organization (visit the organization)
- 4 Volunteer for the organization
- 5 Bring family and friends to visit the organization
- 6 Attend a fundraiser for the organization
- 7 Share organization content on social media
- 8 Write a favorable review of the organization
- 9 Join the board of the organization
- 10 Sign a petition supporting the organization

One more time! Why is membership uniquely important today?

Membership may be the biggest opportunity for financial success

- You are the key to museums thriving today

Memberships are at the center of change

- You lead museums in navigating onsite/offsite engagement

Memberships facilitate connection between people

- You share the sharing of meaningful experiences

Membership is the champion of your mission

- You scale mission-based support

Thanks and appreciation to...

- California Academy of Sciences
- Carnegie Museums
- Exploratorium
- European Union
- European Union Cultural Consortium
- Google
- IMPACTS Research & Development
- MAXXI, Museo Nazionale delle Arti del XXI Secolo
- Monterey Bay Aquarium
- Musée du Louvre
- Musée d'Orsay
- National Aquarium
- National Oceanic and Atmospheric Administration
- Stanford University
- Tennessee Aquarium
- The Ocean Project
- United Nations Educational, Scientific and Cultural Organization
- US Department of State

Speaking of connection...



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